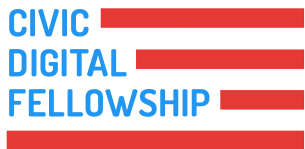


IDEA Digital Site Assessment

Office of Online Services

Michael Lin — Chief of User Experience and Design (UXD)

Tom Hsieh — Program Manager



Irene Guo
University of California San Diego
Cognitive Science, Design

background

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The 21st Century Integrated Digital Experience Act (IDEA)

SEC. 3. WEBSITE MODERNIZATION.

A. Requirements for New Websites and Digital Services.—Not later than 180 days after the date of enactment of this Act, an executive agency that creates a website or digital service that is intended for use by the public, or conducts a redesign of an existing legacy website or digital service that is intended for use by the public, shall ensure to the greatest extent practicable that any new or redesigned website, web-based form, web-based application, or digital service—

1. is accessible to individuals with disabilities in accordance with section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d);
2. has a consistent appearance;
3. does not overlap with or duplicate any legacy websites and, if applicable, ensure that legacy websites are regularly reviewed, eliminated, and consolidated;
4. contains a search function that allows users to easily search content intended for public use;
5. is provided through an industry standard secure connection;
6. is designed around user needs with data-driven analysis influencing management and development decisions, using qualitative and quantitative data to determine user goals, needs, and behaviors, and continually test the website, web-based form, web-based application, or digital service to ensure that user needs are addressed;
7. provides users of the new or redesigned website, web-based form, web-based application, or digital service with the option for a more customized digital experience that allows users to complete digital transactions in an efficient and accurate manner; and
8. is fully functional and usable on common mobile devices.

background



Why is the 21st Century IDEA important?

“In 2019, there were over 14 billion sessions and 38 billion page views on federal websites.”¹

It is **essential** that the government provide “**quick, easy, secure, and accessible**”¹ digital services in order to use **technology** for **societal embetterment**.

¹“21st Century Integrated Digital Experience Act.” *Digital.gov*, General Services Administration, 14 Jul. 2020, digital.gov/resources/21st-century-integrated-digital-experience-act/.

my project

my project

my project

my project

my project

my project

Assess the IRS's 22 most utilized digital properties **against the Act's assessment criteria**, and **provide recommendations** to **improve the consistency** of the IRS's digital presence

my project

Conduct a **comparative analysis** of the **public and private sector** to identify additional opportunities for **improving the customer experience** across the IRS's digital properties

IDEA assessment criteria

1. Accessible
2. Consistent Design
3. No Overlap or Duplication
4. Searchable
5. Provided through Secure Standard Connection (SSC)
6. User-Driven
7. Customizable
8. Functional on Mobile Devices

IDEA assessment criteria

1. Accessible
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7. Customizable
8. Functional on Mobile Devices

new assessment criteria

● 1. **Consistent Design**

● 2. **Searchable**

● 3. **User-Driven**

● 4. **Mobile Friendly**

new assessment criteria

- 1. **Consistent Design**
- 2. **Searchable**
- 3. **User-Driven**
- 4. **Mobile Friendly**
- 5. ***Multilingual Support***
- 6. ***Reachable***
- 7. ***Efficient and Content Relevant***
- 8. ***Clear Guidance***

assessment

assessment

assessment

my assessment

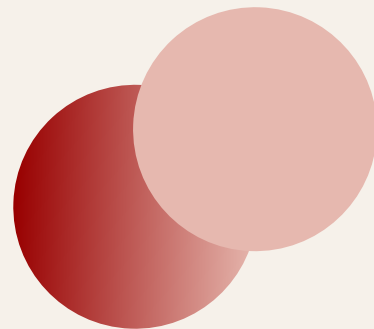
assessment

assessment overview

● Risk of Customer Experience (CX) Debt

Level 0	Little to No Risk
Level 1	Low Risk
Level 2	Medium Risk
Level 3	High Risk

● Site Usage (sessions per year)



assessment overview

● Symbol assessment + definitions of the 8 criteria

++	Level 4	Completely follows best practice
+	Level 3	Mostly follows best practice
-	Level 2	Somewhat follows best practice
--	Level 1	Does not follow best practice

● Recommendations based on the 8 criteria

● Final ranking based on CX Debt

Site**	Consistent Design	Searchable	User Driven	Mobile Friendly	Multilingual Support	Reachable	Efficient & Content Relevant	Clear Guidelines	Risk of CX Debt
	+	-	++	++	+	++	+	-	3 – High
	--	N/A	-	-	--	+	-	-	3 – High
	--	N/A	-	-	-	-	++	+	3 – High
	--	N/A	+	++	-	++	+	+	3 – High
	--	+	+	-	--	+	+	+	3 – High
	--	N/A	-	-	--	-	++	-	3 – High
	+	-	++	++	+	++	+	-	3 – High
	--	N/A	+	-	--	-	+	+	3 – High
	-	N/A	-	++	-	--	-	--	2 – Med
	--	N/A	-	-	--	--	+	-	2 – Med
	-	+	--	++	--	--	+	-	2 – Med
	--	N/A	-	-	--	-	+	+	2 – Med
	++	N/A	++	++	--	-	++	+	2 – Med
	-	N/A	--	+	--	+	N/A	++	2 – Med
	--	+	+	-	--	--	-	--	2 – Med
	--	+	+	-	--	+	-	+	1 – Low
	-	N/A	+	+	--	-	++	-	1 – Low
	++	N/A	++	++	--	-	++	-	1 – Low
	-	++	+	+	--	++	++	+	1 – Low

background

project

assessment

takeaways

Criteria	Symbol	Recommendation
Consistent Design	--	
Searchable	+	
User Driven	+	
Mobile Friendly	-	
Multilingual Support	--	
Reachable	--	
Efficient & Content Relevant	-	
Clear Guidance	--	

major themes

- Implementing a **description** of the service
- Ability to **return back to the related section** on IRS.gov
- Help resources located in a **uniform location**
- Clear error messages with **specific feedback**

takeaways

takeaways

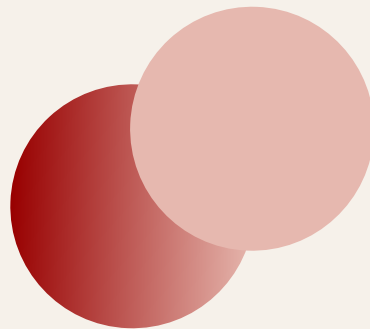
takeaways

takeaways

takeaways

my experience

- **Weekly meetings** with UXD
- **User testing** insights
- **Product & UX** Analysts
- Foresee **Survey Data**
- UXD **Brown Bags**
- **National Tax Forum**



impact

Aided the agency leadership in **prioritizing efforts** to boost **trust and confidence** in IRS's online services, and recommendations for the Office of Online Service's **next steps**

thank you!

special thanks to:

Coding it Forward

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